Quality Schools Grant Program

GRANT APPLICATION WORKSHOP

JANUARY 20, 2016 1 P.M.

HTTP://COMDEV.MT.GOV/PROGRAMS/QUALITYSCHOOLS

Agenda

- Program Overview
- Application Discussion
 - Statutory Priorities
 - Statutory Attributes
 - Supplemental Documents
- Question/Answer Session

Background Information

- Established by the 61st Legislature in 2009
- Section 90-6-801, Montana Code Annotated (MCA)

 Housed in the Montana Department of Commerce, Community Development Division

Applicants

Eligible Applicants:

- K-12 School Districts
- Elementary School Districts
- High School District

Ineligible Applicants:

- Private Schools
- Public Schools outside Montana

Quality Schools Grants

- Grants for each of the following:
 - Planning
 - Emergency
 - Facility & Technology Projects

Project Grants for Facility Improvements

- Major repairs and improvements to existing schools
- Deferred maintenance

- Expansion of existing facility
- Information Technology infrastructure

Project Grants, continued

• One (1) grant per Biennium per District

No maximum or minimum

No match requirement

Project must meet one (1) of six (6) Statutory
 Priorities

Application Submission

- Deadline: March 1, 2016
- Must be postmarked on or before March 1, 2016
- Applications hand-delivered must be received by 5:00 p.m. on deadline date
- If reapplication of a 2014 application that was not funded, a letter and any updated information must be received by deadline.
- One hardcopy and one electronic copy (email, CD, or FTP)

Required Documents

- Completed Application Form
- Board Authorization to submit Application
- Signature by Authorized Official
- Completed Environmental Review
- Preliminary Budget
- Preliminary Implementation Schedule

Applications lacking any one of these items will not be considered

The Application Form

APPLICATION FOR QUALITY SCHOOLS PROJECT GRANTS

SECTION A - PROJECT INFORMATION

Please review the Instructions and the Application Guidelines and Administration Manual for Quality Schools Project Grants for assistance in completing this application form.

ı.	NAME OF SCHOOL DISTRICT:	LE#:			
2.	COUNTY:				
3.	STATUTORY PRIORITY (circle all that apply): #1 #2 #3	#4	#5	#6	
4.	TYPE OF PROJECT:				
5.	TOTAL PROJECT COST:				
,	OUALITY SCHOOLS CRANT FUNDS REQUESTED.				

Problem Definition

- Summary
 - What is your project?
 - What components does it involve?
 - What part of the building does it serve?
 - Are there other parts of the project that will be financed with other funding sources?

Problem Definition, continued

- Background
 - When was your facility built? Have there been any additions or renovations?
 - O How old are the facility components involved in the project?
- Statement of Need
 - Discuss the nature of the problem and its effects on the District. Include documentation, if necessary.

Problem Definition – What is your Project?

- All building components must meet a selected Statutory Priority.
- Components must also:
 - Be functionally related;
 - Be integral to each other such that one cannot be addressed without disturbing or requiring substantial work on others; or
 - Involve significant cost efficiencies when addressed together.
- Exception: Energy Efficiency projects, where the function of the proposed work (reduce energy usage) rather than the function of the building components themselves, may define their relationship

Statutory Priorities

- Six (6) Statutory Priorities
- Project must meet <u>one</u> Priority.
- Ranked using the Statutory Priority that provides the highest score.
- All documents cited or used to validate applicability of a Priority <u>must be included</u> with the application.

- Projects that solve urgent and serious public health or safety problems, or that enable public school district to meet state or federal health or safety standards. Examples:
 - Emergency Generator Replacement
 - Drinking Water Contamination
 - Failing Sewer System
 - Failing Roof
 - Fire Alarm Systems
 - Asbestos Contamination

- Projects that address deferred maintenance by repairing or replacing existing building components that are inoperable or difficult to service or lack minimum integrity. Examples:
 - Infrastructure repairs or updates
 - Boiler replacement
 - Roof replacement
 - HVAC replacement

- Projects that enhance a public school district's ability to offer specific services related to the requirements of the accreditation standards provided for in Section 20-7-111, MCA. Examples:
 - Academic requirements; and
 - Area standards for: communication, arts, health, mathematics, science, social studies, vocational arts, libraries, counseling, and world languages.

- Projects that provide long-term, cost effective benefits to school facilities through energy efficient design. Examples:
 - Boiler Repair/Replacement
 - DDC System
 - Lighting Upgrade
 - HVAC System/Indoor Air Quality
 - Wind/Solar Power
 - Window Replacement
 - Insulation

- Projects that incorporate long-term, cost-effective benefits to school facilities including technology needs of school facilities. Examples:
 - Telephone Service
 - Internet Access (Broadband)
 - Wireless Networking
 - Classroom Video
 - Hardware, Software, training, or other IT resources

- Projects that enhance educational opportunities for students. Examples:
 - Classroom Additions
 - Music Center
 - Vo-Ed Facility
 - Physical Education Facility

Documentation

 A variety of documents may be used to document the applicability of a given Statutory Priority:

Audit FCI Assessment

Citation Letters PERs

PARs Facility Plan

Energy Audit ADA Evaluation

Code Citations Asbestos Reports

Inspection Reports Photos

Blueprints Itemized Cost/Bid Estimate

The need for financial assistance:

Bond information

Debt Service

Account Holdings

General Fund

Flex Fund

Deferred Maintenance Fund

Building Fund

Impact Aid Fund

Median Household Income

District Mill Value

Free/Reduced Lunch

The fiscal capacity of the public school district to meet grant conditions required by the department:

- Who will administer the grant and what is their prior experience managing grants?
- District's ability to secure and manage other sources of funding (other grants, loans, private funding sources).
- Experience filing progress reports on grant-funded project.
- Success with timely completion of past projects.

Past efforts to ensure sound, effective, long-term planning and management of the school facility and attempts to address school facility needs with local resources.

- Long term planning and previous efforts at capitol improvements.
- Project prioritization.
- Project alternatives.
- Reasonable maintenance budgets and practices.
- Previous Quality Schools Grant experience.
- Environmental and technical problems addressed.

The ability to obtain funds from sources other than those provided by the Quality Schools Grant Program.

- Serious efforts to seek out and secure alternate funding sources (both private and public).
- Is Quality Schools participation essential to obtaining alternate funds?
- Does the district receive Oil/Gas, Coal, or Metal Mines tax proceeds?
- Bonding capacity and bond election history.

The importance of the project and support for the project from the local community.

Newspaper articles Board Meeting Minutes

Board Agenda Public Survey

Project Prioritization Needs Assessment

Letters of Support Public Hearing

School Newspaper Website Documents

Facility Plan Community Committee

Educationally Relevant Factors

- 1. The number of students in a district;
- 2. The needs of isolated schools with low population density;
- 3. The needs of urban schools with high population density;
- 4. The needs of students with special needs, such as a child with a disability, an at-risk student, a student with limited English proficiency, a child who is qualified for services under 29 U.S.C. 794, and gifted and talented children; and
- 5. Ability to attract and retain qualified staff.

Proposed Funding Sources

SECTION D - FINANCIAL INFORMATION

1. Proposed Funding Sources: (List loans and grants from same funding source separately.)

	Source	Type of Funds	Amount	Status of Commitment	Conditions on Use	Date Available (MM/YYYY)
1	Quality Schools	Grant	\$	Application Submitted	Ability to meet requirements set forth in the Quality Schools Application Guidelines and contract	
2			\$			
3			\$			
4			\$			
5			\$			
6			\$			
7			\$			
8			\$			

Budget

PRELIMINARY PROJECT BUDGET

Completed by:	For:										
	SOURCE:	SOURCE:	SOURCE:	SOURCE							
QUALITY SCHOOLS ELIGIBLE COSTS:	Quality Schools Grant Program										
Land Acquisition											
Engineering/Architectural Design											
Construction Engineering Services											
Construction											
Materials											
Contingency											
TOTAL ELIGIBLE COSTS	\$0.00	\$0.00	\$0.00	\$0.00							
OTHER (INELIGIBLE) COSTS:											
Personnel Costs	NA										
Office Costs	NA										
Banks & Administration	MA										

Ineligible QS Project Grant Expenses

- Grant administration expenses;
- Operation and maintenance costs;
- Costs of acquiring debt or refinancing existing debt;
- Costs resulting from "cost-plus" contracts, "profit and overhead," or markups'
- Costs for <u>Preliminary</u> Engineering/Architectural Design; and
- Any costs incurred prior to Notice of Award

Project Budget Narrative

Expense Category	Narrative	
Preliminary Engineering/ Architectural Design	Cost associated with hiring Engineer to prepare a preliminary engineering report. This portion was completed in summer/fall 2012 with a Quality Schools Planning Grant.	\$31,250
Engineering/Architectural Design	Expense associated with preparation of final design documents in order to bid the project.	\$5,760
Construction Engineering Services	Hired Engineer as Construction Manager for duration of the project.	\$145,600
Construction (Hard Costs)	Based on preliminary bids. Cost itemization provided in Attachment C.	\$370,000
Permits & Fees	Asbestos Permit, \$150; City Building Permit, \$915; Plan Check Fee, \$595; Plumbing Fees and Inspection, \$120; Mechanical Fee, \$196	\$1,976
Contingency	10% of hard construction costs.	\$37,000
Grant Administration	District Clerk is donating her time to manage the grant, including all progress reporting and submission of requests for reimbursement. Clerk @ \$16/hour for 208 hours, \$3,328.	\$3,328
Legal Costs	Consulted with local attorney regarding bid opening and contracts.	\$320

Implementation Schedule

	_														_
	2015									2016					
TASK	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jul
START-UP															
Receive Notice of Award (estimated)		- x	(-												Ш
Secure Approval of Other Funding															Ш
Finalize Project Budget															Ш
Execute Quality Schools Contract															Ц
PROJECT DESIGN															
Advertise for and Select Engineer															Ш
Begin Project Design															Ц
Complete Project Design															Ц
Prepare Bid Documents															Ц
BID ADVERTISEMENT															
Public Bid Advertisement															Ц
Open Bids and Examine Proposals															Ц
Select Contractor, Award Bid															Ш
PROJECT CONSTRUCTION															
Begin Construction															

Environmental Review

- Complete the Environmental Review
 - MUST include a signature
 - MUST include responses to six questions
- Make a Determination at Public Meeting
 - Category Exclusion
 - FONSI
 - Further Review Needed (including EIS)
- Include a Public Process (next slide for more information)
- Obtain Board Approval

Environmental Public Process

- Public Notices posted in multiple, accessible locations (example: school marquee, school newsletters, website, community centers, etc.)
- Provide documentation
- Public Comment Period prior to final adoption by the School District
- Public Meeting to make final environmental determination
- Approval by School Board with Authorization

Resubmitting a 2017 Biennium Application

- Applications submitted in 2014 for approval from the 2015 Legislature for the 2017 Biennium eligible
- No significant change in scope
- Required: letter stating reapplication signed by Authorized Signatory
- Updated Information: Budget and Implementation Schedule
- Deadline: no later than March 1, 2016

How can we help

- At least 1 Technical Assistance Meeting per Statutory Priority
- Sign-up sheets available
- In person and webinar available
- Week of January 25th

Submission and Questions

Please provide 1 hard copy and an electronic copy (CD) to:

Quality Schools Grant Program
Community Development Division
Department of Commerce
301 S. Park Avenue
PO Box 200523
Helena, MT 59620-0523

DOCQualitySchools@mt.gov

406-841-2770